

*NEWTON-EVANS RESEARCH COMPANY  
Announces Plans for the Publication of the*

# Worldwide Study of the Protective Relay Marketplace In Electric Utilities: 2006-2008

*Providing worldwide marketing information enabling suppliers to formulate  
effective product and marketing plans to participate successfully  
in the major growth market areas for protective relays in electric utilities.*

*Four Volume Study:*

- Volume I *North American Market*
- Volume II *International Market*
- Volume III *Market Assessment and Outlook*
- Volume IV *Supplier Profiles*

*Available from:*

**NEWTON-EVANS RESEARCH COMPANY**

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Newton-Evans Research Company is a marketing research and consulting business, focused on measuring electrical utility markets for a variety of technology and instrumentation equipment. The company believes that relevant, timely utility-based market information enables the world community of utility equipment and systems suppliers to formulate appropriate product and marketing strategies.

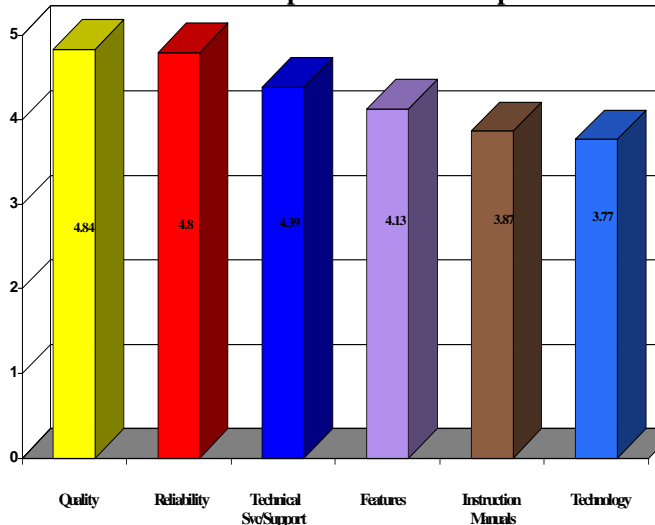
In 1984, Newton-Evans conducted its first comprehensive research program providing a clear view of the different major systems, equipment and services market opportunities for the computer, communications, control systems and related equipment, and software within the American electric utility industry. Since that time, Newton-Evans has conducted hundreds of public and private surveys of the world's leading utilities concerning this equipment and software, as well as a host of other utility automation topics.

Newton-Evans' *Worldwide Study of the Protective Relay Marketplace: 2006-2008*, is a multiclient study which encompasses the world market for protective relays in the electric utility industry. This series of reports is the fifth worldwide study of protective relays which Newton-Evans has undertaken. Participants in this market study include utility specifiers, engineers, and managers from investor-owned utilities, municipal and provincial utilities, cooperative utilities within the United States and Canada, together with national power systems throughout the world.

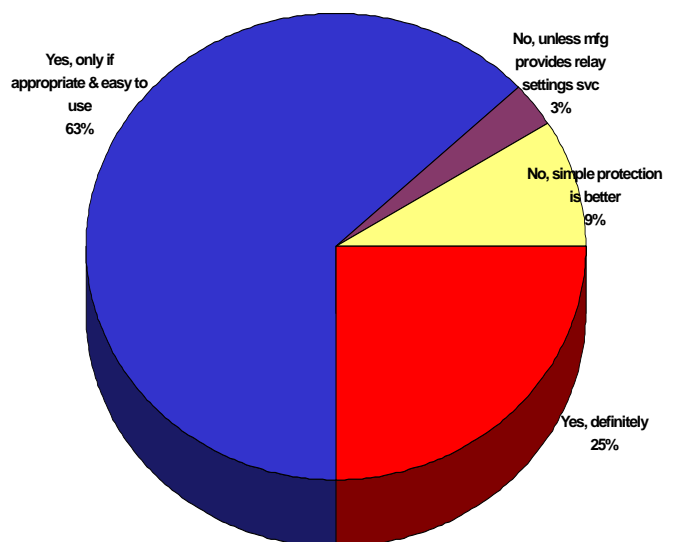
The responses to this new study will yield important information enabling Newton-Evans Research to prepare this four-volume series with reliable forecasts for major classes and types of relays. Between 2002 and 2004, and again between 2004 and 2006, a number of events have occurred to reshape the demand curve. First, the continuing pervasiveness of digital relays for new unit purchase consideration; nearly 90% of all new relay unit purchases are now digital units. This is up another 20 percentage points from mid-1999. Secondly, ongoing utility restructuring is occurring in spite of a slowdown in deregulation activities. Thirdly, the need for increased grid operational and informational security is apparent to all observers.

*Data collected from this study is presented in the text and analysis, and again visually through the use of many presentation-quality charts and graphs like those below.*

**Figure 11A North America**  
**Ranking of Relay-Related Attributes**  
**when Rating Manufacturers**  
 where 1=least important to 5=most important



**Figure 13 North America**  
**Importance Level of Increasing Integrated Functionality**



Worldwide Study of the  
Protective Relay Marketplace in Electric Utilities: 2006-2008

SURVEY TOPICS:

Number of Protective Relays to be Purchased over the 2006-2008 Time Frame

Three-Year Budget Allocations for Protective Relays

Reasons for Using/Planning to Use Digital Relay Protection

Type of Relay Scheme Redundancy in Use/Planned for Use in Digital-Based Relaying Terminals

Four-Year Forecast of Planned Distribution Relay Purchases by Application

Requirement for Isolation Test Switches as Part of the Relay Package

Purchasing Policies for Protective Relay Systems

Systems to Which Relay Data is Transmitted

Communications Requirements for Access to Relay Data

Average Percentage of Digital Relays in Installed Base and Planned for New and Retrofit Applications Purchases

Need for Future Installations Using Modern IED Relays Connected to a Digital System

Description of "Ideal" Relays by Application

External Assistance Needed for Various Relay-Related Activities

Ranking of Relay Manufacturers by Fifteen Specific Attribute Categories

Need for Increasing Integrated Functionality in a Relay

Research Methodology

Field survey work is being conducted using a mix of primary research methods, including personal interviews, mail surveys, faxes, e-mail and follow-up telephone interviews by Newton-Evans Research Company staff. In addition to discussions with utility specifiers, managers and influencers, Newton-Evans conducts interviews with protective relay industry officials to gather management impressions about the size, scope, direction and trends in the relay business. Discussions and information exchanges with international suppliers provide additional market insight.

## World Market Survey and Analysis

The *Worldwide Study of the Protective Relay Marketplace in Electric Utilities: 2006-2008* will be the fifth international study researched and published by Newton-Evans Research Company on the topic of protective relays. The study will measure current market sizes and contains projections, on a world region basis, for the next several years. The entire research program will define the product and market requirements which suppliers must meet in order to successfully participate in one or more of these diverse world market regions.

Newton-Evans Research Company estimates from its earlier 1996 relay market study indicate that the North American relay market stood at about \$180 million. Even with decreasing prices, increasing functionality, and stiff price-based competition eroding profits in some selling situations, the domestic market by 2004 not only remained stable because of increased digital relaying applications and the integration of relay devices within other larger devices and subsystems, the market continued to grow substantially, exceeding one billion dollars globally. The new study will yield valuable mid-2006 market sizing estimates and projections for relay and relay controls suppliers.

### Publication Ordering Information

To order the *Worldwide Study of the Protective Relay Marketplace: 2006-2008*, please mail in your order with a check (U.S. dollars) or purchase order to **Newton-Evans Research Company, 10176 Baltimore National Pike, Suite 204, Ellicott City, Maryland 21042, USA**. You may also order by credit card, by phone at 1-800-222-2856 or 1-410-465-7316, or by faxing in this completed form (1-800-847-1877 or 1-410-750-7429) to Newton-Evans. If you are in need of any further information, please contact our offices or e-mail to [cnewton@newton-evans.com](mailto:cnewton@newton-evans.com).

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